Global Consumer Drivers

And their role in shaping the global travel and events industry today

**Value**
High inflation and rising costs are impacting travel decisions, with visitors seeking out value for money. High-income visitors are most resilient

**Convenience**
Consumers increasingly expect travel to be seamless, through online bookings and digital tools such as AI and AR

**Wellness**
Travel is seen as a chance to escape and refresh, both physically and mentally. Outdoor pursuits, relaxation opportunities and the emotional stimulation of connection to a place are all key

**Authenticity**
More visitors are moving beyond the well-beaten tourist trails, seeking out experiences that are genuinely rooted in place and tradition

**Discovery**
Off the beaten path tourism also drives visitors to seek out the unexpected - hidden gem locations and hyper local traditions, foods and customs - and feel that their experience is unique

**Responsibility**
Consumers, especially younger generations, are increasingly conscious of their impact on communities and the environment, and seek for their tourism to do no harm, or actively give back
Three Key Trends for Scotland

Top global trends that will impact the Scottish tourism and events industry over 2024-2027

**TREND 1**
**People with Passion**
Evolution towards more connected travel experiences that gives rise to a tourism model that focuses on deep, authentic community engagement and tailored journeys placing people at the heart.

**TREND 2**
**Places and Immersive Experiences**
Global shift towards authentic travel, prompting the industry to offer deeper cultural connections and personalised exploration, particularly for Scotland's rich heritage and hidden gems.

**TREND 3**
**Power to Change**
A new generation of travellers are increasingly eager to access responsible and meaningful experiences and events. Businesses will need to continue to adapt and embrace to fulfil this consumer desire.
For each trend, we created a structure to explore its meaning, influence and impact for Scotland.

1. **DEFINITION**
   - What is the trend and why is it important?

2. **KEY FACETS**
   - What are the key factors contributing to this trend?

3. **TRAVELLER TYPES**
   - What are the key traveller types and what does the trend mean to them?

4. **CASE STUDIES**
   - How is the trend manifesting globally and in Scotland?

5. **IMPACT**
   - What are the implications of this trend for the Scottish tourism and events industry?
Placing people at the heart of tourism is a key pathway to success in a market where visitors are increasingly looking for connection, authenticity and personalisation. Quality of experience is paramount for visitors, encouraging return visits and word-of-mouth marketing. Visitors who are primarily interested in experiencing a new culture and willing to pay for curated or authentic local experiences are an increasingly important group, and the drive towards longer stays, due to the rise of the digital nomad, opens up further opportunities to build community relationships. Personal connection and deeper community engagement does not just improve visitor experience, it can also help foster a mutually beneficial relationship between visitor, community and the tourism sector and its employees.

Source: Euromonitor International Lifestyles Survey 2023, n=40,691, global respondents

60% Seek curated experiences tailored to themselves (66% among 30-44 year-olds)

63% Feel that being active in their community is important to them

38% Are looking to engage more in their community in the next 5 years
The global tourism landscape is increasingly being shaped by the desire for authentic experiences and the integration of special interests and values into travel. Over the next 1-3 years, these factors will drive significant change:

**KEY PILLARS**
- **Visitors** Seek out unique experiences that reflect personal values
- **Communities** Benefit from tourism that respects their heritage
- **Staff** Ambassadors providing insight and access

**ENABLERS**
- **Authentic Experiences** Empowered by technology to align with the individual
  - **Tech and Digital** VR previews, AI recommendations, seamless booking
- **Marketing to the Power of One** Individualised campaigns with tailored messages

**ATTRIBUTES**
- **Human Centric** Ensures prioritisation of personal health and wellbeing
- **Local and Authentic** Allows visitors to engage deeply

**MEGATRENDS**
- **Experience More** A shift from material possessions to the pursuit of memorable, meaningful experience
- **Personalisation** Becoming a norm with travellers expecting to tailor experiences to their own needs and desires
Key Traveller Types

Travellers wishing for personalised, unique engagement range from those looking for a tailored luxury service to those wishing to get involved in direct voluntary work.

- **Cultural Explorer**
  *Personal and Authentic*
  
  Personalisation for the Cultural Explorer is about having a unique and authentic holiday experience, and to engage directly with local communities. Target with: Supper clubs with local foods, homestays, local craft markets, individual or small group guided tours.

- **Luxury Seeker**
  *Personal and Premium*
  
  For the Luxury Seeker, personalisation is important, and needs to be high end. This group looks for quality and status and is eager to buy unique items. Target with: Private tours (jewellery workshops, sightseeing), chef’s table, private theatre box, personal shoppers.

- **Adventure Lover**
  *Personal and Bold*
  
  Adventure Lovers want a unique experience that others would not dare pursue - outdoor activities engaged in wild nature are exciting for them. Target with: Personal specialist guides into wilderness areas, multi-day small group treks or adrenaline-fuelled activities.

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Source: Euromonitor International Lifestyles Survey 2023, n=40,691, global respondents
ENNISKILLEN TASTE EXPERIENCE

Small group guided tours around this off the beaten path Irish town, stopping at multiple small businesses and local producers to sample local foods and drinks, and hear the stories around them. This is cultural immersion which feels authentic and seamless.

Private and bespoke tours are also available, to cater to the Luxury Seeker segment.
A’ THE AIRTS, COMMUNITY ARTS CENTRE, DUMFRIES & GALLOWAY

This small community arts centre is part of Scotland’s BeLocal initiative, encouraging visitors to be “temporary locals” immersed in local communities and culture, and to give back. The centre is home to a wide range of classes and events in partnership with other local bodies. Its attraction to tourists is Sanquhar Knitting, a local tradition. It offers tours to visitors, including private bespoke tours, as well as selling locally-knitted items (in person and online), and is part of a Scotland knitting tour.
In Scotland, the People with Passion trend will manifest in a tourism industry that puts people first, crafting marketing strategies that speak to individuals, leveraging technology to deliver personalised journeys, and nurturing the local character and authenticity that draw visitors.

Scottish tourism will need to balance innovation with tradition, offering personalised, value-driven experiences that resonate with both visitors and locals. This evolution will require a symbiotic relationship between visitors, communities and staff, each playing a pivotal role in creating a sustainable, enriching tourism sector that contributes to Scotland's cultural vibrancy and economic prosperity.
Engage more deeply with visitors by weaving narratives around characters
- Museums might use stories naming specific outstanding local people
- Cafés and restaurants can feature recipes named after family members
- Self-guided routes can track the footsteps or daily life of a local figure
- Events might theme around a local character or myth
- Encourage staff to engage warmly and authentically with visitors

Define target audience through customer profiling to tailor offer
- This helps create a quasi-personalised experience based on group needs
- Craft markets targeting Cultural Explorers might focus on local artisans, traditional techniques and materials, while those targeting Eco Adventurers might ensure sustainable material sourcing, or incorporate an entry fee or donation that is funneled to a local charity

Target Luxury Seekers and Digital Travellers with digital visit planning
- Machine learning to turn customer feedback into recommendations
- Big data learning and AI can help to upsell specific products and activities, enhance a guided tour service, or to sell a specific destination or lodging
Travellers are increasingly seeking personalised immersive experiences that allow them to delve into new cultures in a more meaningful way. Over the next few years, this pursuit of authentic engagement - whether through local cuisine, natural wonders, unique activities, or lesser-known locales - will shape the travel industry. The global travel industry will pivot to accommodate this trend, including investing in streamlined booking systems, integrated transport solutions and a focus on promoting undiscovered gems that offer a fresh perspective even on well-known destinations. Businesses will be tasked with crafting experiences that reveal the country's hidden treasures and allow visitors to connect with the country’s heritage, landscapes and people in a way that feels personal and direct.
Places and Immersive Experiences

The trend is set to redefine global tourism in the next 1-3 years, emphasising depth over breadth in travel. This shift is characterised by the following:

KEY PILLARS

- **Immersive Visitor Experience**
  - Across diverse places and businesses, immersion will be the norm, with travellers expecting to dive deep into the cultural fabric of destinations.

- **Authentic Discovery**
  - Seeking out hidden gems and hidden perspectives

ENABlers

- **Seamless and Connected**
  - Supported by seamless journeys from planning to execution through cutting-edge technology.

- **Joined Up Next-Gen Transport**
  - Convenient options to move within and between destinations, enhancing the ease of exploration

ATTRIBUTES

- **Convenient**
  - Seamlessness will penetrate all aspects of travel including lodging, activities and food.

- **Local and Authentic**
  - Quality in activities, food and shopping will underpin immersion

MEGATRENDS

- **Experience More**
  - Overarching megatrend, with travellers seeking richer, fuller experiences beyond traditional tourism.

- **Convenience**
  - Remains a priority, with travellers valuing ease and efficiency to maximise their immersive experiences
Key Traveller Types

A range of visitor types seek out immersive experiences and hidden gems. Most want these experiences to be as seamless as possible, especially for travel between different elements.

**Cultural Explorer**
*Immersive and Sensorial*

Experiencing new places and exploring all aspects of local life - history, art and food - is central, and they are willing to spend for high-quality options. Target with: Small, specialist museums, quirky local foods, walking tours in lesser trodden urban areas.

73% are willing to pay 10%+ more for quality food and dining.

**Digital Traveller**
*Immersive and Seamless*

Lost without the internet, this group stays committed to easy digital booking even while branching out into more adventurous travel. Target with: Online booking, joined up services, QR codes for deeper cultural information.

73% are willing to pay 10%+ more for convenient travel options.

**Luxury Seeker**
*Immersive and Relaxed*

Luxury seekers are increasingly interested in cultural immersion but do not want the hard work of discovery. They are willing to pay a premium for a top end, relaxed experience. Target with: Boutique hotels with local advice, local produce tasting menus or whisky flights.

22% prioritise relaxation; 15% prioritise convenient travel.

Source: Euromonitor International Lifestyles Survey 2023, n=40,691, global respondents
ORIGIN TRAVEL SUBSCRIPTION SERVICE

Origin is a luxury high-end, high-tech subscription service and app that uses AI and local expertise to give travellers personalised recommendations and itineraries, based on feedback from previous trips. It charges USD3,000 for an annual membership that comes with unlimited access to trip planning and local support. This caters to Luxury Seekers looking for an authentic and unique experience, outsourcing the process of discovery.
Hyper local, community cluster, local storytelling, transport solutions, responsible tourism

Scotland

LOCH NESS HUB

This one-stop community-run location facilitates a community cluster of small businesses, signposting visitors to local attractions and accommodation. It also smoothly links visitors up to simple transport options (hiking and biking trails, boat trips, baggage transfer services for walkers) while leveraging eco trends (e-bike hire, EV charging points). Visitors are also able to give back - money spent at the Loch Ness Hub feeds back into community projects.
Places and Immersive Experiences

What does the trend mean for Scotland?

For Scotland, this trend signifies an opportunity to redefine its tourism narrative. Scottish businesses will be tasked with crafting experiences that reveal the country’s hidden treasures and allow visitors to connect with Scotland’s heritage, landscapes and people in a way that feels personal and direct.

Digital innovation will play a key role in providing the tools that enable travellers to seamlessly explore Scotland’s rich tapestry of experiences. This will not only satisfy modern travellers’ appetite for authenticity but also contribute to sustainable tourism practices that benefit both visitors and local communities alike.
Places and Immersive Experiences

Recommendations

Foundations

Hyper local

Brand identity cluster for small businesses

Second steps

Information dissemination

Support visitors to explore independently

Third steps

Next-gen joined up transport

Accessible, seamless, interlinked travel

Hyper local: Small business clusters, storytelling, simple digital engagement
- Leverage theme around local history, industry, product or wildlife
- Signpost visitors through multiple linked attractions that retain identity
- Small festivals, markets, cultural events around local themes
- Self-guided tours using QR codes, signposting shops, museums, cafés

Information dissemination: Using digital lite to help people move around
- Support visitors into discovery, promote ease of movement
- Small tour groups, private tours, self-guided tours
- Digital lite: Online booking systems, links to transport bookings
- Ride shares, bicycle hires, private taxis, concierge-led transport booking

Visitor discovery needs to be supported by seamless travel options
- Digitally integrated journeys from planning to execution
- Simple-to-use multimodality
- Real-time digital travel information
Scotland’s abundance of nature and culture is not enough alone to target new generations of travellers, who have additional expectations on top of this. Visitors want travel options that offer environmental and social benefits, as well as physical and mental health benefits. They expect accessibility and inclusivity, and they expect all this to be delivered through digital transformation: Businesses need to embrace change to deliver on these points. Concerns over the climate crisis, a commitment to diversity and personal wellbeing, and demand for convenience are driving this shift, with visitors showing a readiness to invest more in travel that answers this. **Eco-tourism is evolving to meet this change, transcending its traditional no-frills approach as it begins to cater to Luxury Seekers, Digital Travellers and Wellness Enthusiasts.** These consumers are no longer satisfied with the basics; they demand sustainable travel that does not compromise on comfort, convenience or service quality.

*Source: Euromonitor International Lifestyles Survey 2023, n=40,691, global respondents*
Power to Change

The trend is forecast to significantly shape global tourism within the next 1-3 years, prioritising meaningful travel with a positive footprint. This shift is characterised by the following:

**KEY PILLARS**
- **Regenerative**
  - Travellers want to contribute to the socioeconomic vitality of their destinations
- **Wellbeing and Climate**
  - Intersection of travel, physical and mental health and climate action

**ENABLERS**
- **Transparency**
  - Visitors are more discerning and able to measure and understand eco and ethical business practice
- **Advances in Infrastructure**
  - Harmonising the natural and built environment to create more integrated, ethical, diverse and sustainable travel

**ATTRIBUTES**
- **Conscious, Responsible, Inclusive**
  - This is characterised by travel decisions made with an awareness of their impact, a responsible attitude towards destinations and an inclusiveness that embraces and celebrates diversity

**MEGATRENDS**
- **Sustainability and Wellness**
  - This trend is mirrored in the travel industry as visitors factor in these issues for travel choices
- **Diversity**
  - Embracing and celebrating diversity and inclusion
Key Traveller Types

Preferences for sustainable travel, responsible and ethical travel and for the ease of tech-assisted services permeate through many types of traveller

**Adventure Lover**  
*Eco and Discovery*

Adventure lovers are at one with nature: They want to explore but do no harm, and if possible, give back to the community and environment. Target with: Eco lodges, wild camping, cycling, walking, self-guided tours based on public transport

**Digital Traveller**  
*Eco and Online*

The Digital Traveller is all about online seamless services and prefers shopping to nature; but still considers sustainability an important factor in travel. Target with: Sustainable transport solutions, online paperless booking systems.

**Eco Adventurer**  
*Eco and Ethical*

Sustainability is a prime motivator but willingness to pay more for it is lower than others. Ethically motivated, they are more likely to spend on voluntourism. Target with: Nature activities that contribute towards conservation (such as wildlife sightings, reporting, eco lodges)

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**Source:** Euromonitor International Lifestyles Survey 2023, n=40,691, global respondents

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- **30%**
  - Try to shop in locally-owned stores

- **27%**
  - Pick their travel destinations based on the quality of the shopping

- **83%**
  - Would spend 10%+ more for voluntourism

*Note: Voluntourism refers to tourism where travellers participate in voluntary work, often for a charity*
CRISTALINO LODGE, ALTO FLORESTA, BRAZIL

Cristalino Lodge elevates eco-tourism into the luxury segment. While basic rooms are an option, luxury bungalows feature a private garden with outdoor bath and shower; the restaurant serves high-end Amazonian food and quality local wines, while the floating deck adds luxurious relaxation into the mix.

The lodge exists to protect and conserve the forest, with all architecture design and materials sustainable.
WILD DISCOVERY

Scotland-based wildlife travel company Wild Discovery embraces conservation tourism with its small group tailor-made tours, combining sustainability, discovery and personalisation and adding all-inclusive pricing into the mix. The focus is on Scotland, but the company also offers tours across the world.

The company partners with conservation programmes and sustainable initiatives, and with local food producers.
Power to Change

What does the trend mean for Scotland?

For Scotland, this means embracing and embedding these global movements into the very fabric of its tourism strategy. Businesses are encouraged to adapt to meet the changing needs of consumers. This will involve developing tourism offerings that are regenerative, promote holistic wellbeing, are inclusive and accessible, are digitally convenient and are rooted in the principles of sustainability and resilience. Scottish tourism is thus poised to become a leader in responsible travel, setting an example for how destinations can thrive by aligning with these values.
Power to Change

Recommendations

Foundations
Highlight values
With a focus on younger travellers and visitors

Ensure marketing materials highlight eco, ethical and accessibility
• These are important selling points for many younger consumers
• Highlight any local sourcing, CSR initiatives, sustainable practices
• Ensure online presence with simple efficient booking systems

Second steps
Build sustainable positioning
Simple steps to improve ethical standing

Take steps to create a sustainable, diverse, ethical positioning
• Purchase local where possible and collaborate with other local businesses
• Offer vegan and vegetarian options, donate leftover food to local charities
• Partnerships with local conservation groups
• Events should seek to be plastic free, use renewable energy, recycle or compost waste, and use LED lighting
• Task employees to lead in specific green and DEI strategies, offer rewards

Third steps
Invest and commit
Sustainable buildings, tech solutions

Invest in more expensive and complex initiatives to fully benefit
• Address transportation with electric charging points, bike hire, shuttle bus
• Automation: Smart showers, occupancy sensors for light and thermostat
• Solar panels, water recovery and reuse systems, geothermal cooling towers
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